

Practice Administrator User Role

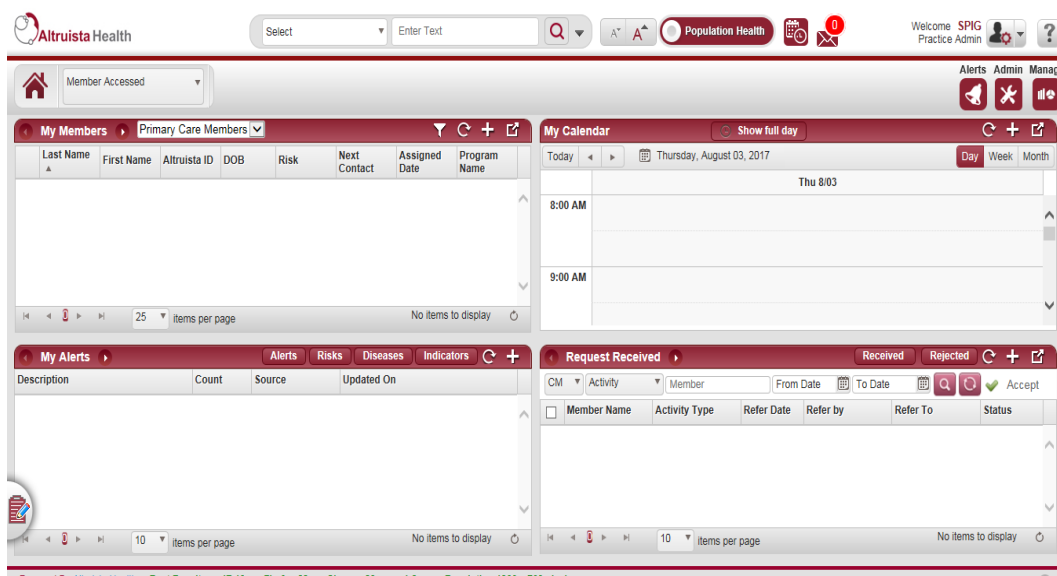
This week of Care Coordination Tool training will focus on several aspects of the tool including the **Practice Administrator User Role**.

After this self-guided training, you should be able to perform the following functions:

- 1.1 View Population Health Provider Dashboard
- 1.2 View and Edit Member Summary Data
- 1.3 Manage Care Staff
 - Update or Inactivate Care Staff Users
- 1.4 Reset Your Password
- 1.5 Assign a Member's Care Team
- 1.6 Exercise: Assign a member to yourself (only applicable for Practice Administrator and Care Team Manager user roles)

1.1 View Population Health Provider Dashboard

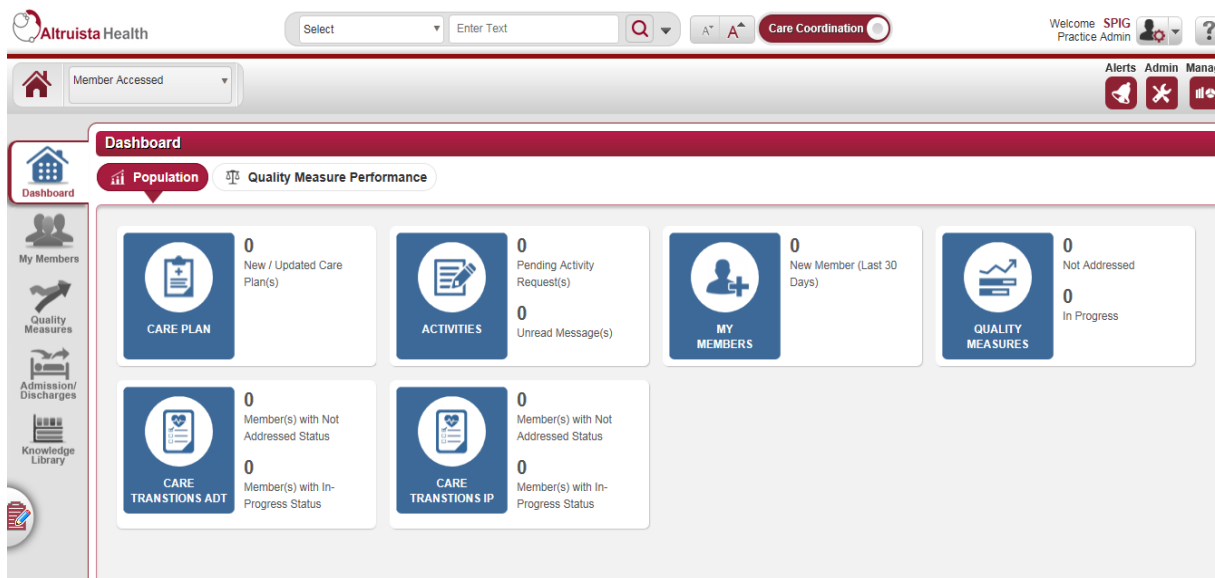
1. When a **Practice Administrator** logs in to the Care Coordination Tool, the Population Health view appears as shown below.



Note: The Population Health Dashboard view for Practice Administrators (as well as Care Coordinators and Care Team Managers) is different than a provider's view; this dashboard view includes information about My Members, My Calendar, My Alerts, and Requests Received.

2. In order to switch to the same Population Health view as a provider, click on the **Population Health/Care Coordination toggle button** on the top center of the screen.



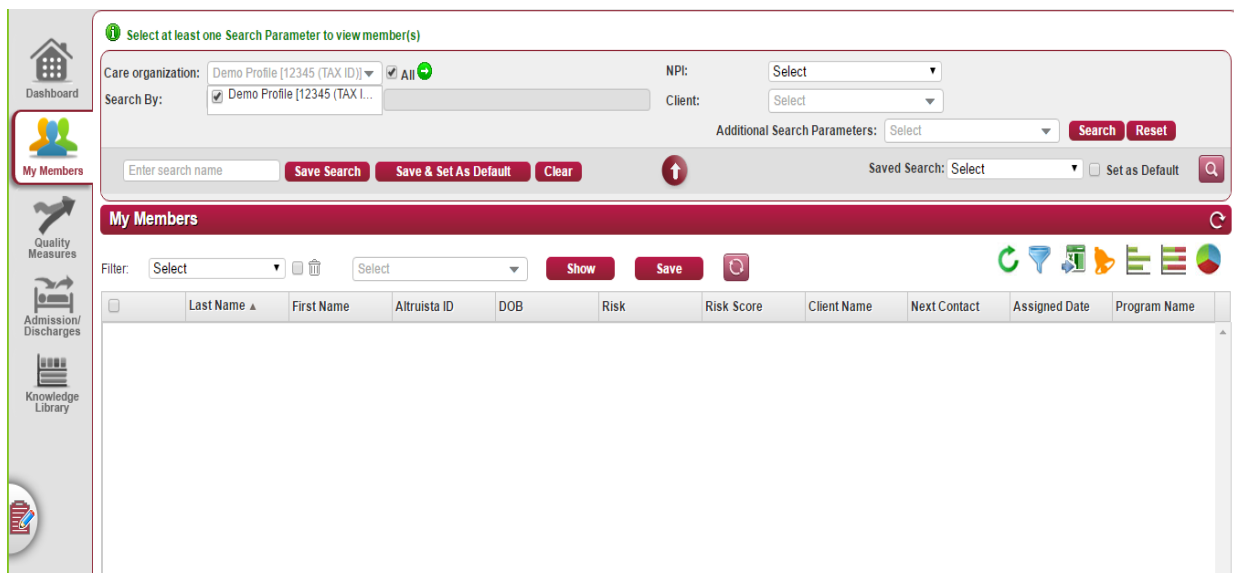


The dashboard includes a sidebar with navigation links: Dashboard, My Members, Quality Measures, Admission/Discharges, and Knowledge Library. The main content area displays several key metrics:

- CARE PLAN:** 0 New / Updated Care Plan(s)
- ACTIVITIES:** 0 Pending Activity Request(s), 0 Unread Message(s)
- MY MEMBERS:** 0 New Member (Last 30 Days)
- QUALITY MEASURES:** 0 Not Addressed, 0 In Progress
- CARE TRANSITIONS ADT:** 0 Member(s) with Not Addressed Status, 0 Member(s) with In-Progress Status
- CARE TRANSITIONS IP:** 0 Member(s) with Not Addressed Status, 0 Member(s) with In-Progress Status

1.2 View and Edit Member Summary Data

1. The Practice Administrator can view a member's data associated to the Practice Taxpayer Identification Number(s) (TIN) for which they have access to.
 - a. Select the **My Members** tab and in Global Search, select a **Practice TIN** from the **Care Organization** drop-down.



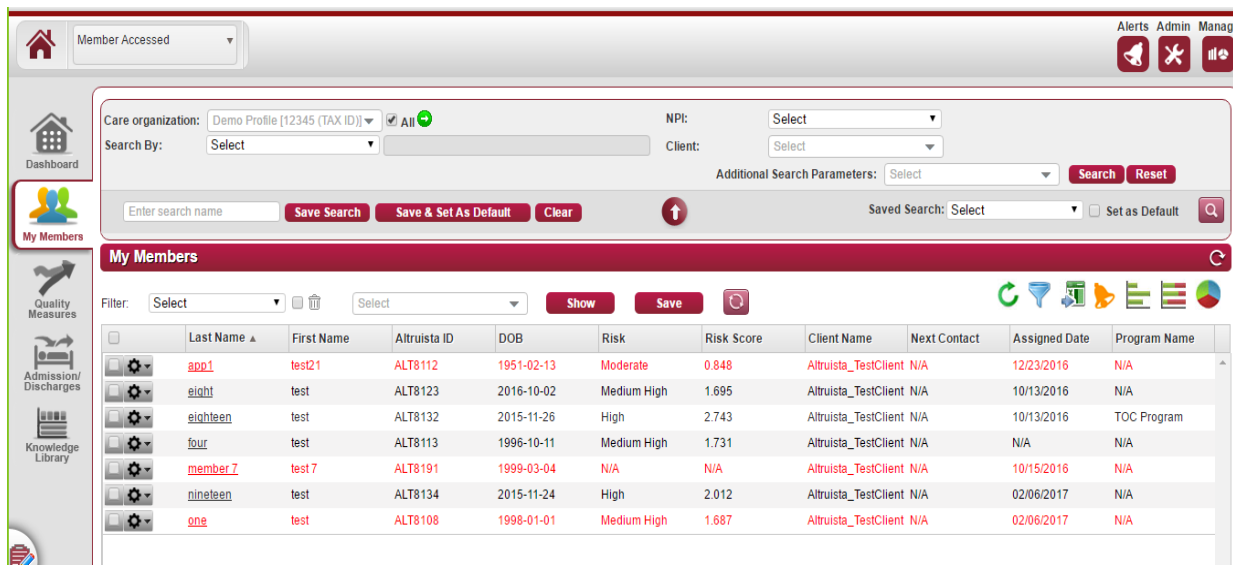
The 'My Members' section includes a search bar with the following filters:

- Care organization:** Demo Profile [12345 (TAX ID)]
- Search By:** Demo Profile [12345 (TAX I...]
- NPI:** Select
- Client:** Select
- Additional Search Parameters:** Select
- Buttons:** Search, Reset, Save Search, Save & Set As Default, Clear

Below the search bar is a table of members. The table has the following columns:

| | Last Name | First Name | Altruista ID | DOB | Risk | Risk Score | Client Name | Next Contact | Assigned Date | Program Name |
|--------------------------|-----------|------------|--------------|-----|------|------------|-------------|--------------|---------------|--------------|
| <input type="checkbox"/> | | | | | | | | | | |

- b. Click on the **Search Icon** to view members that are associated to the selected TIN.



Member Accessed

Care organization: Demo Profile [12345 (TAX ID)] All

Search By: Select NPI: Select Client: Select

Additional Search Parameters: Select Search Reset

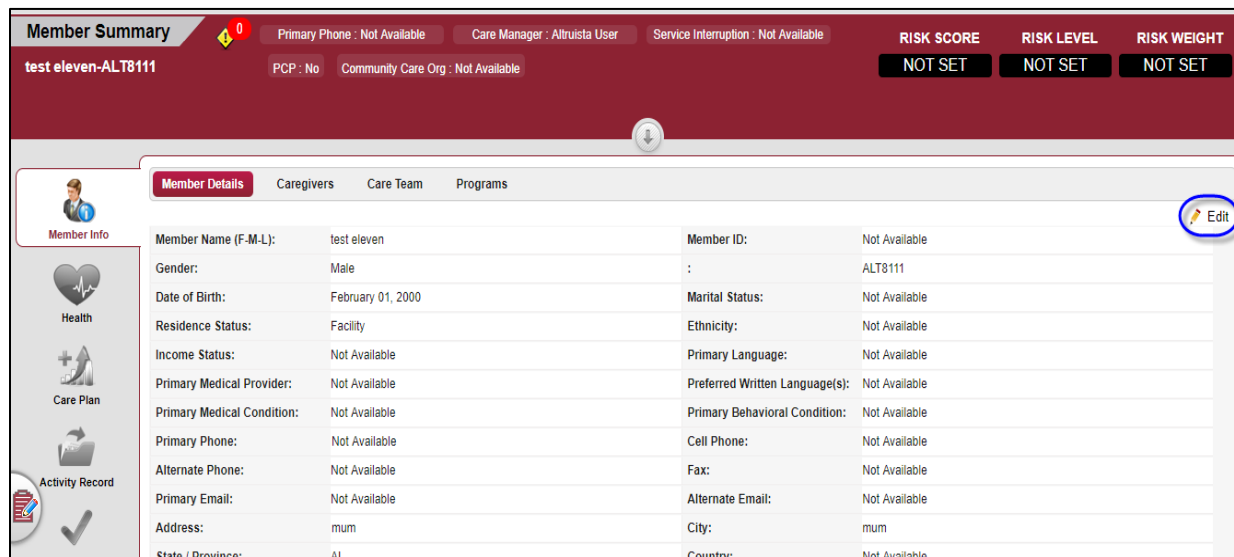
Enter search name Save Search Save & Set As Default Clear Saved Search: Select Set as Default

My Members

Filter: Select Show Save

| | Last Name | First Name | Altruista ID | DOB | Risk | Risk Score | Client Name | Next Contact | Assigned Date | Program Name |
|----------|-----------|------------|--------------|------------|-------------|------------|----------------------|--------------|---------------|--------------|
| app1 | test21 | test | ALT8112 | 1951-02-13 | Moderate | 0.848 | Altruista_TestClient | N/A | 12/23/2016 | N/A |
| eight | test | test | ALT8123 | 2016-10-02 | Medium High | 1.695 | Altruista_TestClient | N/A | 10/13/2016 | N/A |
| eighteen | test | test | ALT8132 | 2015-11-26 | High | 2.743 | Altruista_TestClient | N/A | 10/13/2016 | TOC Program |
| four | test | test | ALT8113 | 1996-10-11 | Medium High | 1.731 | Altruista_TestClient | N/A | N/A | N/A |
| member 7 | test 7 | test | ALT8191 | 1999-03-04 | N/A | N/A | Altruista_TestClient | N/A | 10/15/2016 | N/A |
| nineteen | test | test | ALT8134 | 2015-11-24 | High | 2.012 | Altruista_TestClient | N/A | 02/06/2017 | N/A |
| one | test | test | ALT8108 | 1998-01-01 | Medium High | 1.687 | Altruista_TestClient | N/A | 02/06/2017 | N/A |

- c. Click on Member's Last Name **hyperlink** to view the member's data in the **Member Summary** section.



Member Summary

Primary Phone : Not Available Care Manager : Altruista User Service Interruption : Not Available

test eleven-ALT8111 PCP : No Community Care Org : Not Available

RISK SCORE NOT SET RISK LEVEL NOT SET RISK WEIGHT NOT SET

Member Details Caregivers Care Team Programs

Member Info


| | | | |
|----------------------------|-------------------|--------------------------------|---------------|
| Member Name (F-M-L): | test eleven | Member ID: | Not Available |
| Gender: | Male | : | ALT8111 |
| Date of Birth: | February 01, 2000 | Marital Status: | Not Available |
| Residence Status: | Facility | Ethnicity: | Not Available |
| Income Status: | Not Available | Primary Language: | Not Available |
| Primary Medical Provider: | Not Available | Preferred Written Language(s): | Not Available |
| Primary Medical Condition: | Not Available | Primary Behavioral Condition: | Not Available |
| Primary Phone: | Not Available | Cell Phone: | Not Available |
| Alternate Phone: | Not Available | Fax: | Not Available |
| Primary Email: | Not Available | Alternate Email: | Not Available |
| Address: | mum | City: | mum |
| State / Province: | Al | Country: | Not Available |

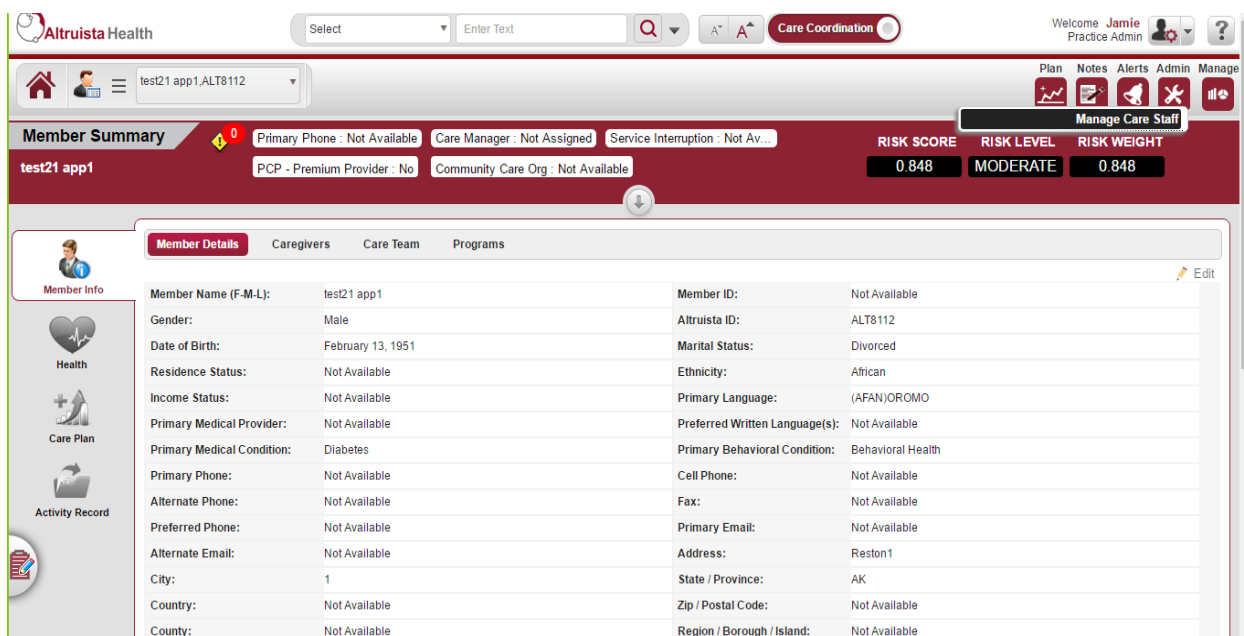
Edit

Note: In the **Member Summary** section, the Practice Administrator (as well as any other user role) can view and also edit member's demographic and medical information by clicking the **Edit** button. This is helpful because each member has only one patient record in the tool. Therefore, if one provider knows that member's updated phone number and inputs it in their member summary section, another provider can see that new phone number when they log into the tool. **When editing member information, all required fields need to be filled out in order to save changes successfully.**

1.3 Manage Care Staff

1. The Practice Admin can update/inactivate care staff user(s) assigned to their practice where the Practice Admin has access.

- a. Click on the **Admin** icon  and select **Manage Care Staff** from the drop-down menu.

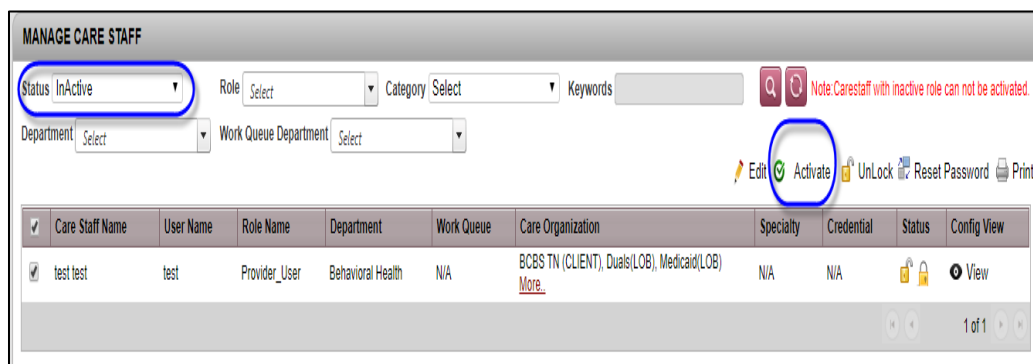


The screenshot displays the Altruista Health interface. At the top, there's a navigation bar with 'Altruista Health' logo, a search bar, and user information 'Welcome Jamie Practice Admin'. Below this is a 'Member Summary' section for 'test21 app1'. It includes status indicators for 'Primary Phone', 'Care Manager', 'Service Interruption', 'PCP - Premium Provider', and 'Community Care Org'. Risk scores are shown: 'RISK SCORE 0.848', 'RISK LEVEL MODERATE', and 'RISK WEIGHT 0.848'. The 'Member Details' tab is active, showing a table of member information. The 'Admin' icon is highlighted in the top right corner of the interface.

| Member Details | |
|--------------------------------|-------------------|
| Member Name (F-M-L): | test21 app1 |
| Gender: | Male |
| Date of Birth: | February 13, 1951 |
| Residence Status: | Not Available |
| Income Status: | Not Available |
| Primary Medical Provider: | Not Available |
| Primary Medical Condition: | Diabetes |
| Primary Phone: | Not Available |
| Alternate Phone: | Not Available |
| Preferred Phone: | Not Available |
| Alternate Email: | Not Available |
| City: | 1 |
| Country: | Not Available |
| County: | Not Available |
| Member ID: | Not Available |
| Altruista ID: | ALT8112 |
| Marital Status: | Divorced |
| Ethnicity: | African |
| Primary Language: | (AFAN)OROMO |
| Preferred Written Language(s): | Not Available |
| Primary Behavioral Condition: | Behavioral Health |
| Cell Phone: | Not Available |
| Fax: | Not Available |
| Primary Email: | Not Available |
| Address: | Reston1 |
| State / Province: | AK |
| Zip / Postal Code: | Not Available |
| Region / Borough / Island: | Not Available |

Note: The Practice Administrator will not be able to search or view any member data that is not associated to the TIN(s) where the Practice Administrator has access.

- a. In the **Manage Care Staff** panel, select **InActive** from the **Status** drop-down list to view the Care Staff members in Inactive status. **Note:** By default, system displays only Active records.



MANAGE CARE STAFF

Status: **InActive** (dropdown) Role: Select Category: Select Keywords: [text box] [Search icon]

Department: Select Work Queue Department: Select

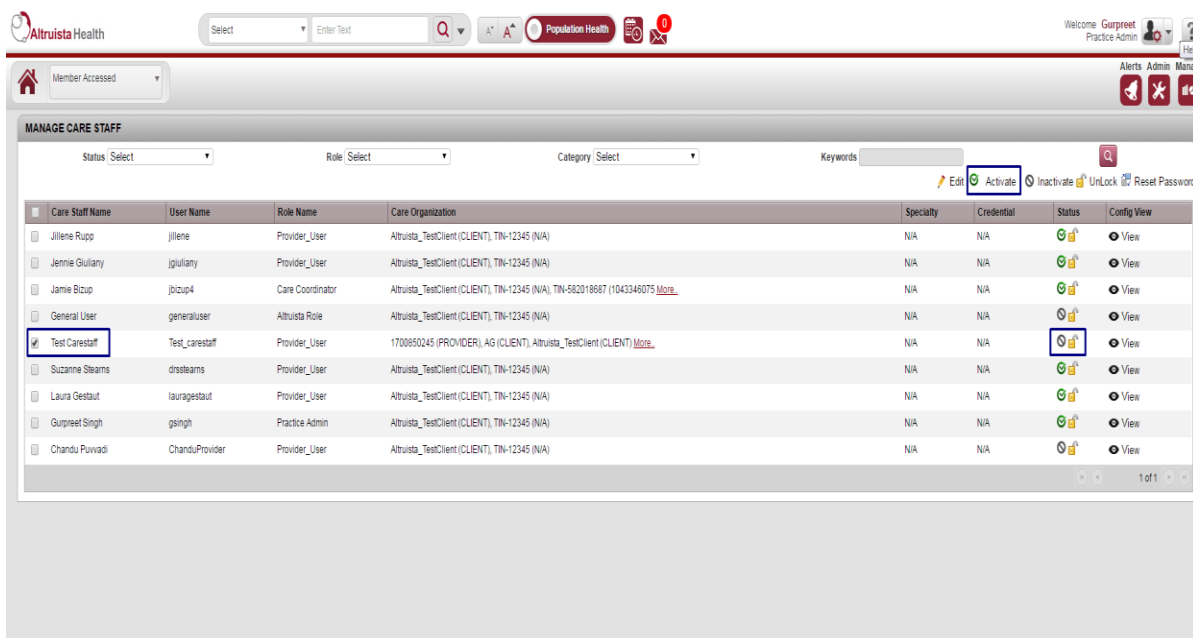
[Edit icon] [Activate icon] [UnLock icon] [Reset Password icon] [Print icon]

Note: Carestaff with inactive role can not be activated.

| <input checked="" type="checkbox"/> | Care Staff Name | User Name | Role Name | Department | Work Queue | Care Organization | Specialty | Credential | Status | Config View |
|-------------------------------------|-----------------|-----------|---------------|-------------------|------------|------------------------------------------------------------------------|-----------|------------|--------|-------------|
| <input checked="" type="checkbox"/> | test test | test | Provider_User | Behavioral Health | N/A | BCBS TN (CLIENT), Duals(LOB), Medicaid(LOB) More... | N/A | N/A | | |

1 of 1

- b. Select a care staff member by selecting the check mark box next to the Care Staff Name, clicking on the **Activate** icon to change the status from **Inactive to Active** for the care staff member, and clicking **OK** when prompted for confirmation.



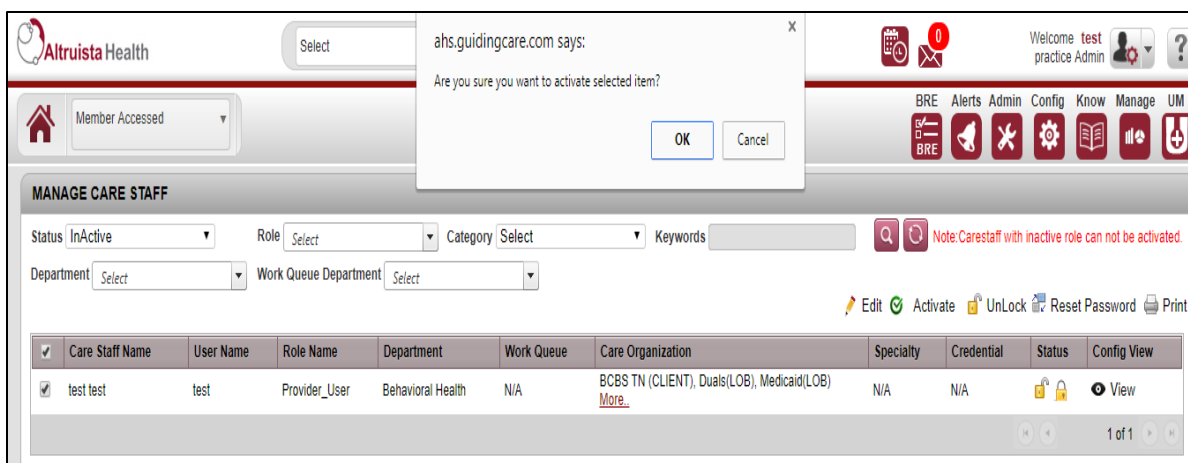
MANAGE CARE STAFF

Status: Select Role: Select Category: Select Keywords: [text box] [Search icon]

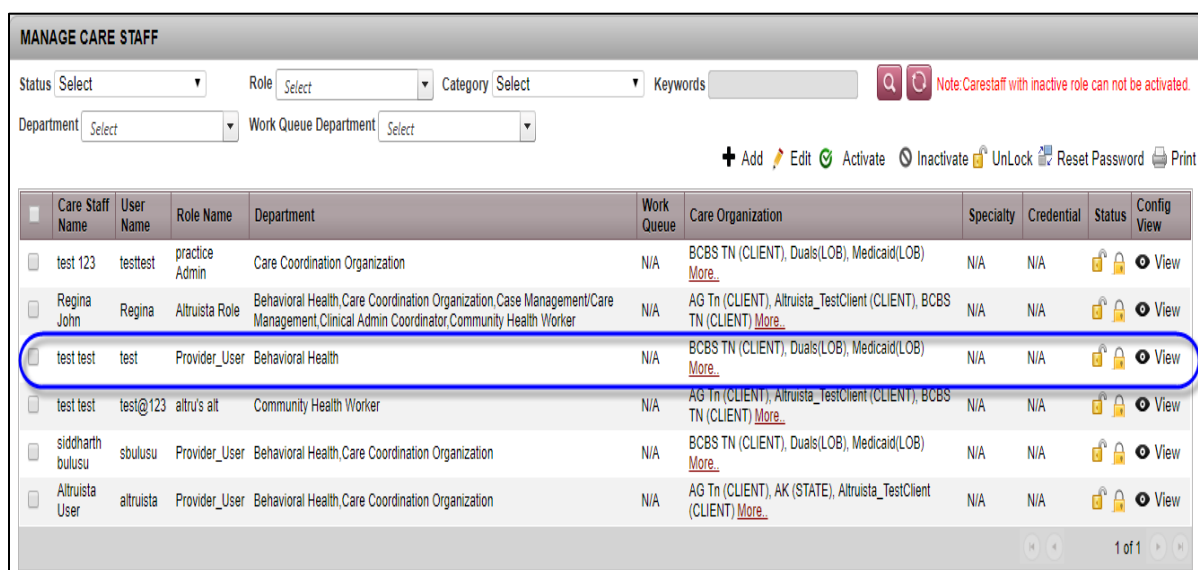
[Edit icon] [Activate icon] [Inactivate icon] [UnLock icon] [Reset Password icon]

| <input type="checkbox"/> | Care Staff Name | User Name | Role Name | Care Organization | Specialty | Credential | Status | Config View |
|-------------------------------------|-----------------------|----------------|------------------|----------------------------------------------------------------------------------------------------|-----------|------------|--------|-------------|
| <input type="checkbox"/> | Jillene Rupp | jillene | Provider_User | Altruista_TestClient (CLIENT), TIN-12345 (N/A) | N/A | N/A | | |
| <input type="checkbox"/> | Jennie Gullany | jgullany | Provider_User | Altruista_TestClient (CLIENT), TIN-12345 (N/A) | N/A | N/A | | |
| <input type="checkbox"/> | Jamie Bcup | jbcup4 | Care Coordinator | Altruista_TestClient (CLIENT), TIN-12345 (N/A), TIN-562018687 (1043346075) More... | N/A | N/A | | |
| <input type="checkbox"/> | General User | generaluser | Altruista Role | Altruista_TestClient (CLIENT), TIN-12345 (N/A) | N/A | N/A | | |
| <input checked="" type="checkbox"/> | Test Carestaff | Test_carestaff | Provider_User | 1700650245 (PROVIDER), AG (CLIENT), Altruista_TestClient (CLIENT) More... | N/A | N/A | | |
| <input type="checkbox"/> | Suzanne Stearns | dsstearns | Provider_User | Altruista_TestClient (CLIENT), TIN-12345 (N/A) | N/A | N/A | | |
| <input type="checkbox"/> | Laura Gestaut | lauragestaut | Provider_User | Altruista_TestClient (CLIENT), TIN-12345 (N/A) | N/A | N/A | | |
| <input type="checkbox"/> | Gurpreet Singh | gsingh | Practice Admin | Altruista_TestClient (CLIENT), TIN-12345 (N/A) | N/A | N/A | | |
| <input type="checkbox"/> | Chandu Puvadi | ChanduProvider | Provider_User | Altruista_TestClient (CLIENT), TIN-12345 (N/A) | N/A | N/A | | |

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- c. After clicking on the **Activate** icon, the status of the care staff member is updated from **Inactive** to **Active**.

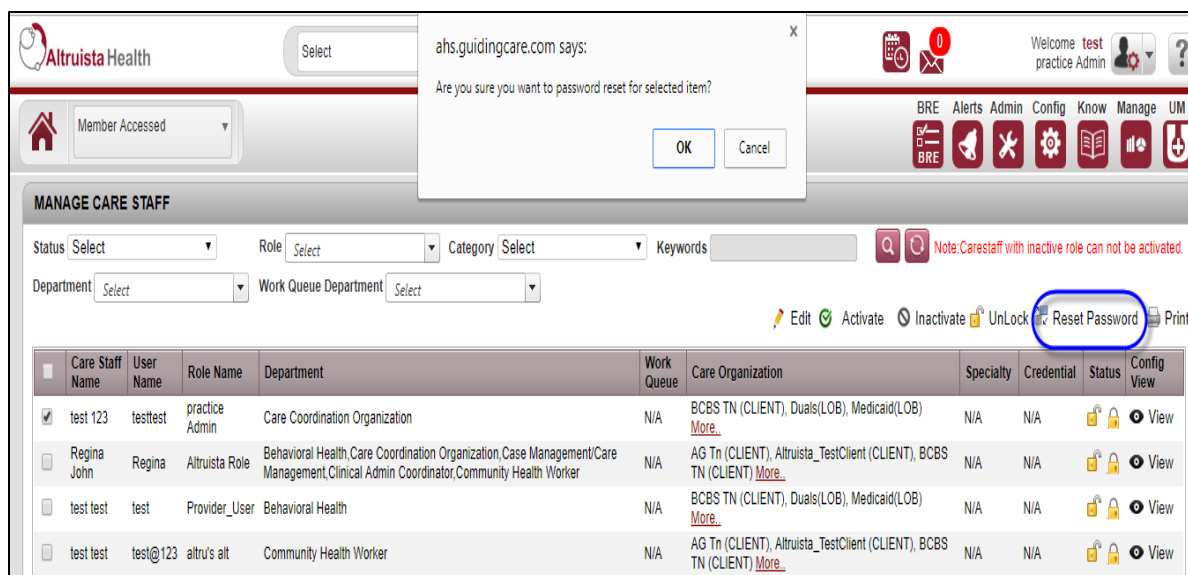


| Care Staff Name | User Name | Role Name | Department | Work Queue | Care Organization | Specialty | Credential | Status | Config View |
|------------------|-----------|----------------|-----------------------------------------------------------------------------------------------------------------------------------------|------------|-----------------------------------------------------------------|-----------|------------|----------|-------------|
| test 123 | testtest | practice Admin | Care Coordination Organization | N/A | BCBS TN (CLIENT), Duals(LOB), Medicaid(LOB) | N/A | N/A | Inactive | View |
| Regina John | Regina | Altruista Role | Behavioral Health, Care Coordination Organization, Case Management/Care Management, Clinical Admin Coordinator, Community Health Worker | N/A | AG Tn (CLIENT), Altruista_TestClient (CLIENT), BCBS TN (CLIENT) | N/A | N/A | Inactive | View |
| test test | test | Provider_User | Behavioral Health | N/A | BCBS TN (CLIENT), Duals(LOB), Medicaid(LOB) | N/A | N/A | Active | View |
| test test | test@123 | altu's alt | Community Health Worker | N/A | AG Tn (CLIENT), Altruista_TestClient (CLIENT), BCBS TN (CLIENT) | N/A | N/A | Inactive | View |
| siddharth bulusu | sbulusu | Provider_User | Behavioral Health, Care Coordination Organization | N/A | BCBS TN (CLIENT), Duals(LOB), Medicaid(LOB) | N/A | N/A | Inactive | View |
| Altruista User | altruista | Provider_User | Behavioral Health, Care Coordination Organization | N/A | AG Tn (CLIENT), AK (STATE), Altruista_TestClient (CLIENT) | N/A | N/A | Inactive | View |

Note: The Practice Admin can also change the status of a care staff member from **Active** to **Inactive** by following the same steps shown above in the screenshots and clicking on the **Inactivate** icon. If the care staff member being inactivated has members or activities assigned to him/her in the tool, a Care Staff References window will populate allowing the practice administrator to refer the members or activities to other, active care staff members.

1.4 Reset Your Password

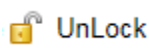
1. In the **Manage Care Staff** panel, the Practice Administrator can reset care staff members' passwords.
 - a. Select a care staff member's name and click the **Reset Password** icon. When prompted to reset the password, select **OK**.



The screenshot shows the Altruista Health web application interface. At the top, there's a navigation bar with the Altruista Health logo and a 'Select' dropdown. Below this is a 'MANAGE CARE STAFF' section. A modal dialog box is open in the center, displaying the message: 'ahs.guidingcare.com says: Are you sure you want to password reset for selected item?' with 'OK' and 'Cancel' buttons. In the background, the 'MANAGE CARE STAFF' section includes filters for Status, Role, Category, Keywords, Department, and Work Queue Department. Below these filters is a table of care staff members. The table has columns: Care Staff Name, User Name, Role Name, Department, Work Queue, Care Organization, Specialty, Credential, Status, and Config View. The first row is selected, and the 'Reset Password' button in the 'Config View' column is circled in blue.

| Care Staff Name | User Name | Role Name | Department | Work Queue | Care Organization | Specialty | Credential | Status | Config View |
|-----------------|-----------|----------------|-----------------------------------------------------------------------------------------------------------------------------------------|------------|-----------------------------------------------------------------|-----------|------------|--------|-------------|
| test 123 | testtest | practice Admin | Care Coordination Organization | N/A | BCBS TN (CLIENT), Duals(LOB), Medicaid(LOB) | N/A | N/A | 🔒 | 🔗 View |
| Regina John | Regina | Altruista Role | Behavioral Health, Care Coordination Organization, Case Management/Care Management, Clinical Admin Coordinator, Community Health Worker | N/A | AG Tn (CLIENT), Altruista_TestClient (CLIENT), BCBS TN (CLIENT) | N/A | N/A | 🔒 | 🔗 View |
| test test | test | Provider_User | Behavioral Health | N/A | BCBS TN (CLIENT), Duals(LOB), Medicaid(LOB) | N/A | N/A | 🔒 | 🔗 View |
| test test | test@123 | altru's alt | Community Health Worker | N/A | AG Tn (CLIENT), Altruista_TestClient (CLIENT), BCBS TN (CLIENT) | N/A | N/A | 🔒 | 🔗 View |

Note: If a care staff member has locked themselves out of their account, the practice admin will first need to click the check box beside their name and choose the **Unlock** button

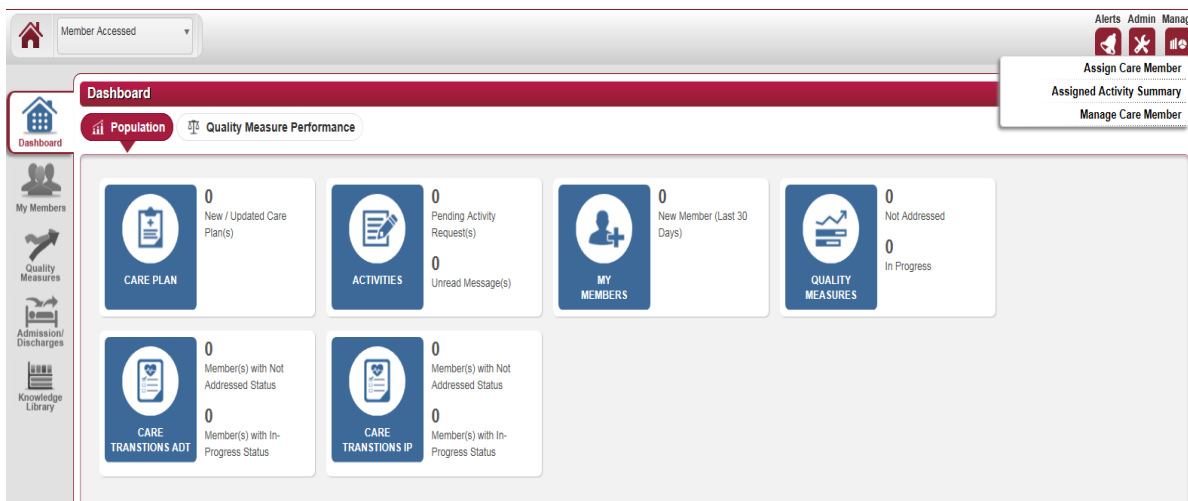


. Then they will be able to activate the account by following the steps above.

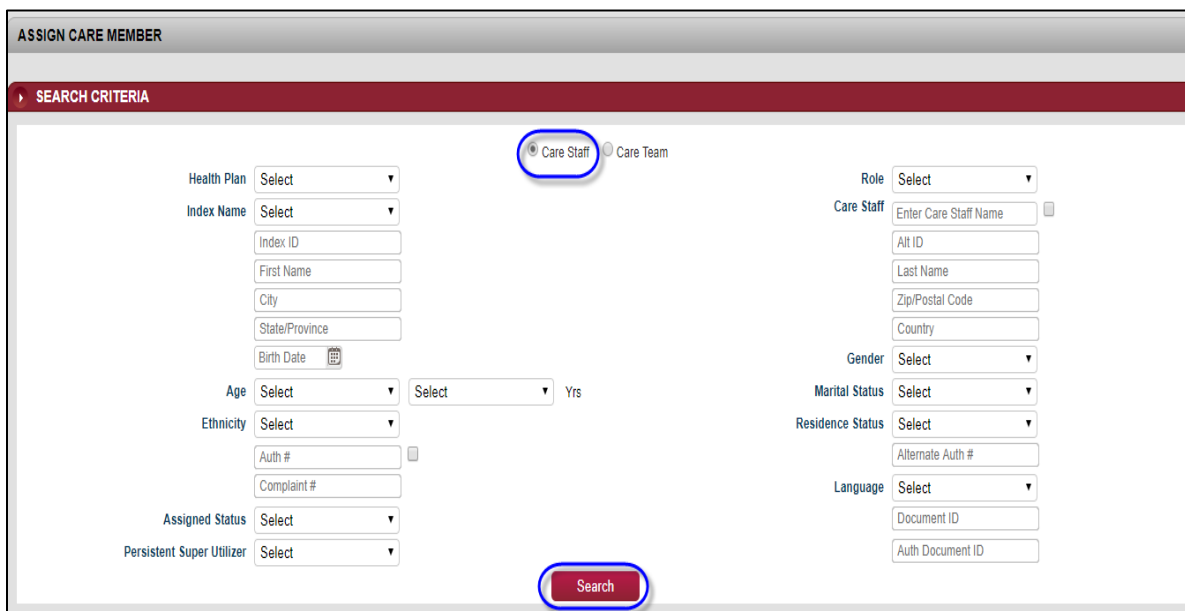
1.5 Assign a Member's Care Team

1. The Practice Administrator (and Care Team Manager) user role can assign and re-assign Care Coordinators and Care Team Managers to a Member's Care Team.

- a. From any screen, click on the Manage Icon  and select **Assign Care Member** from the drop-down menu.



- b. In the **Assign Care Member** panel, select the **Care Staff** radio button and click on search.



The screenshot shows the "ASSIGN CARE MEMBER" panel. At the top, there is a "SEARCH CRITERIA" section. Below this, there are two radio buttons: "Care Staff" (selected) and "Care Team". The "Care Staff" section contains several input fields: Health Plan (Select), Index Name (Select), Index ID, First Name, City, State/Province, Birth Date, Age (Select), Ethnicity (Select), Assigned Status (Select), Persistent Super Utilizer (Select), Role (Select), Care Staff (Enter Care Staff Name), Alt ID, Last Name, Zip/Postal Code, Country, Gender (Select), Marital Status (Select), Residence Status (Select), Alternate Auth #, Language (Select), Document ID, and Auth Document ID. A "Search" button is located at the bottom right.

2. In the example shown below, the member selected currently is not assigned a Care Manager.
 - a. To assign a Care Manager, select the member by **clicking on the checkbox** next to the Altruista ID, and enter the name of the care staff member at the bottom left corner of the screen.

ASSIGN CARE MEMBER

Select Show Show Search Activity Export Excel

| <input type="checkbox"/> | Altruista Id | Last Name | First Name ▲ | Gender | Age | City | State | ZipCode | Phone | Medical Condition | PSU Score | Care Manager |
|-------------------------------------|--------------|------------|--------------|--------|----------|-------------|-------|---------|-------|-------------------|-----------|----------------|
| <input checked="" type="checkbox"/> | ALT8235 | LN1 | FN1 | Female | 43YEARS | N/A | AK | N/A | N/A | N/A | N/A | N/A |
| <input type="checkbox"/> | ALT8236 | LN2 | FN2 | Male | 26YEARS | N/A | AK | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8140 | Ph_001 | Ph_01 | Male | 11MONTHS | Springfield | AK | N/A | N/A | N/A | N/A | Wesley McRae |
| <input type="checkbox"/> | ALT8141 | ph002 | ph2 | Male | 11MONTHS | N/A | AK | N/A | N/A | N/A | N/A | Chandu Puvvadi |
| <input type="checkbox"/> | ALT8142 | ph002 | Ph2 | Male | 28YEARS | SPI | AK | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8119 | thirteen | test | Female | 7YEARS | mum | AL | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8139 | twenty one | test | Female | 1YEARS | mum | AL | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8111 | eleven | test | Male | 17YEARS | mum | AL | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8124 | fifteen | test | Male | 6YEARS | N/A | AL | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8134 | nineteen | test | Male | 1YEARS | N/A | AL | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8116 | twelve | test | Male | 18YEARS | mum | AK | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8218 | member 7 | test | Male | 16YEARS | N/A | AL | 20190 | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8128 | seventeen | test | Male | 7YEARS | mum | AR | N/A | N/A | N/A | N/A | Altruista User |

1 - 50 of 88 items

☐ Work Queue

Care Staff: Assign Unassign

☐ Re-assign current primary care manager activities to new primary care manager

- b. After clicking on the **Assign** button, the Practice Administrator successfully assigned Care Manager Altruista User to the member:

ASSIGN CARE MEMBER

Select Show Show Search Activity Export Excel

Assigned successfully.

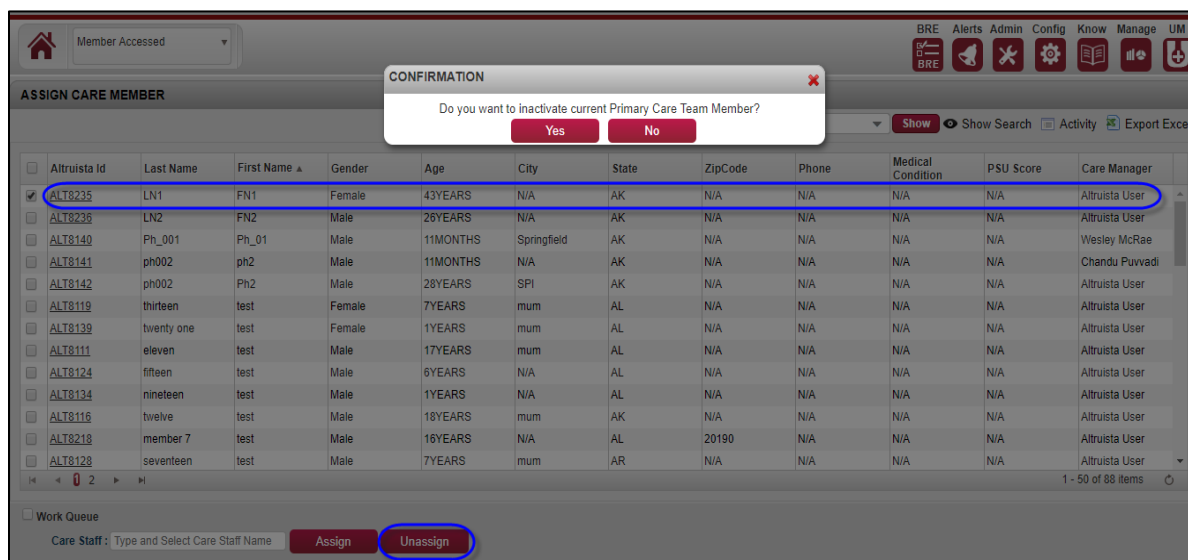
| <input type="checkbox"/> | Altruista Id | Last Name | First Name ▲ | Gender | Age | City | State | ZipCode | Phone | Medical Condition | PSU Score | Care Manager |
|-------------------------------------|--------------|------------|--------------|--------|----------|-------------|-------|---------|-------|-------------------|-----------|----------------|
| <input checked="" type="checkbox"/> | ALT8235 | LN1 | FN1 | Female | 43YEARS | N/A | AK | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8236 | LN2 | FN2 | Male | 26YEARS | N/A | AK | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8140 | Ph_001 | Ph_01 | Male | 11MONTHS | Springfield | AK | N/A | N/A | N/A | N/A | Wesley McRae |
| <input type="checkbox"/> | ALT8141 | ph002 | ph2 | Male | 11MONTHS | N/A | AK | N/A | N/A | N/A | N/A | Chandu Puvvadi |
| <input type="checkbox"/> | ALT8142 | ph002 | Ph2 | Male | 28YEARS | SPI | AK | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8119 | thirteen | test | Female | 7YEARS | mum | AL | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8139 | twenty one | test | Female | 1YEARS | mum | AL | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8111 | eleven | test | Male | 17YEARS | mum | AL | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8124 | fifteen | test | Male | 6YEARS | N/A | AL | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8134 | nineteen | test | Male | 1YEARS | N/A | AL | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8116 | twelve | test | Male | 18YEARS | mum | AK | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8218 | member 7 | test | Male | 16YEARS | N/A | AL | 20190 | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8128 | seventeen | test | Male | 7YEARS | mum | AR | N/A | N/A | N/A | N/A | Altruista User |

1 - 50 of 88 items

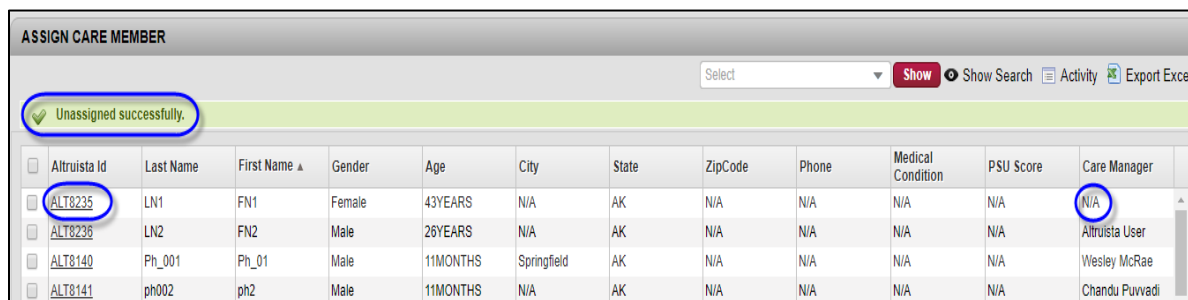
☐ Work Queue

Care Staff: Assign Unassign

- c. To unassign Care Manager Altruista User, select the same member, and click on the **“Unassign” button** on the bottom right corner of the screen. When prompted to confirm the change, select **“Yes”**.



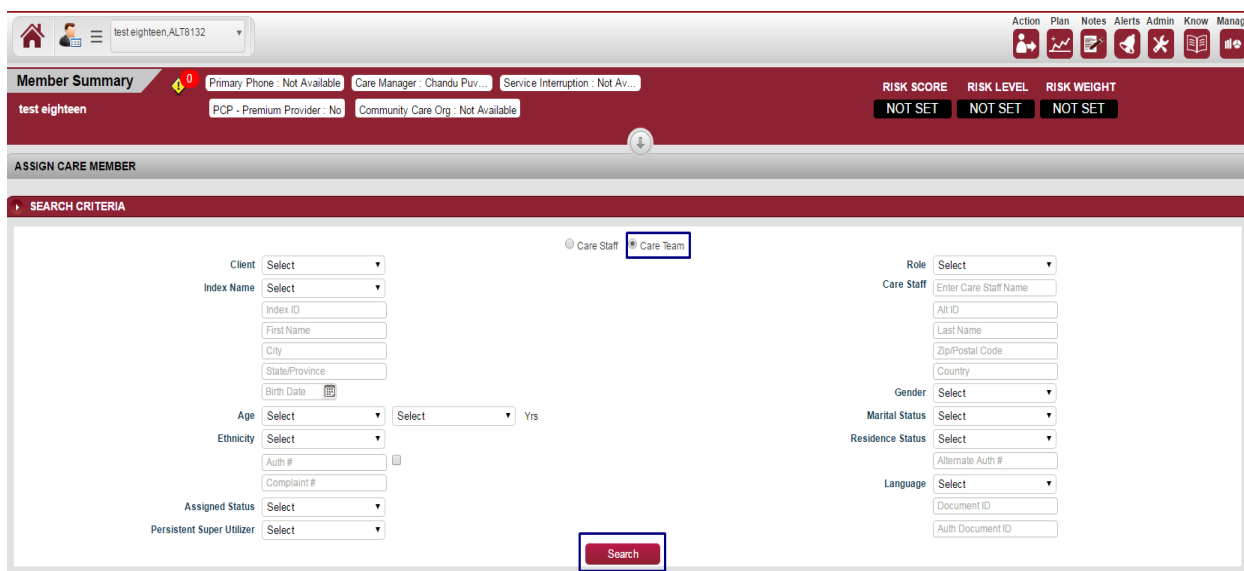
The screenshot shows the 'ASSIGN CARE MEMBER' interface. A confirmation dialog box is displayed in the center, asking: "Do you want to inactivate current Primary Care Team Member?". The dialog has two buttons: "Yes" and "No". The "Yes" button is highlighted with a red circle. Below the dialog, a table lists members with columns: Altruista Id, Last Name, First Name, Gender, Age, City, State, ZipCode, Phone, Medical Condition, PSU Score, and Care Manager. The first row, with Altruista Id ALT8235 and Care Manager Altruista User, is highlighted with a blue circle. At the bottom right, the "Unassign" button is circled in blue.



The screenshot shows the 'ASSIGN CARE MEMBER' interface after the unassignment action. A green banner at the top displays the message: "Unassigned successfully." Below the banner, the same table of members is shown. The first row, with Altruista Id ALT8235 and Care Manager N/A, is highlighted with a blue circle. The "Unassign" button is also circled in blue.

3. The Practice Administrator can group members together and assign to a Care Coordinator or Care Team.

- a. In the **Assign Care Member** panel, select the **Care Team radio button**, and click on **Search** to filter members. **Note:** Other search criteria such as City and Zip Code are available to filter members.



Member Summary test eighteen.ALT8132 Primary Phone : Not Available Care Manager : Chandu Puv... Service Interruption : Not Av... RISK SCORE NOT SET RISK LEVEL NOT SET RISK WEIGHT NOT SET

test eighteen PCP - Premium Provider : No Community Care Org : Not Available

ASSIGN CARE MEMBER

SEARCH CRITERIA

☐ Care Staff ☒ **Care Team**

Client: Select
Index Name: Select
Index ID:
First Name:
City:
State/Province:
Birth Date:
Age: Select
Ethnicity: Select
Assigned Status: Select
Persistent Super Utilizer: Select

Role: Select
Care Staff: Enter Care Staff Name
Alt ID:
Last Name:
Zip/Postal Code:
Country:
Gender: Select
Marital Status: Select
Residence Status: Select
Language: Select
Alternate Auth #:
Document ID:
Auth Document ID:

Search

- Select a Member or Members (you can multi-select and group members together) to assign a Care Coordinator to the members' Care Team.
- In the example below, the Practice Administrator has selected Care Coordinator Jillene Rupp (by selecting her name from the **Default** window and using the > button to move it into the **Selection** window) from 12/29/2016 to 08/16/2017.

| <input type="checkbox"/> | Altruista Id | Last Name | First Name | Gender | Age | City | State | ZipCode | Phone | Medical Condition | PSU Score | Care Manager |
|-------------------------------------|--------------|-----------|------------|--------|----------|-------------|-------|---------|--------------|---------------------|-----------|----------------|
| <input checked="" type="checkbox"/> | ALT8235 | LN1 | FN1 | Female | 43YEARS | N/A | AK | N/A | N/A | N/A | N/A | N/A |
| <input checked="" type="checkbox"/> | ALT8236 | LN2 | FN2 | Male | 26YEARS | N/A | AK | N/A | N/A | N/A | N/A | N/A |
| <input type="checkbox"/> | ALT8140 | Ph_001 | Ph_01 | Male | 11MONTHS | Springfield | AK | N/A | N/A | N/A | N/A | Wesley McRae |
| <input type="checkbox"/> | ALT8142 | ph002 | Ph2 | Male | 28YEARS | SPI | AK | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8108 | one | test | Male | 11MONTHS | delhi | NY | 12345 | N/A | Acute Otitis Media | N/A | test test |
| <input type="checkbox"/> | ALT8109 | two | test | Male | 11MONTHS | CA | NY | N/A | 396-986-5689 | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8110 | three | test | Male | 12MONTHS | N/A | NY | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8111 | eleven | test | Male | 17YEARS | mum | AL | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8113 | four | test | Male | 11MONTHS | N/A | NY | N/A | N/A | Diabetic retinop... | N/A | Altruista User |
| <input type="checkbox"/> | ALT8115 | five | test | Male | 11MONTHS | N/A | NY | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8116 | twelve | test | Male | 18YEARS | mum | AK | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8117 | six | test | Male | 12MONTHS | N/A | NY | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8119 | thirteen | test | Female | 7YEARS | mum | AL | N/A | N/A | N/A | N/A | Altruista User |

1 - 50 of 87 items

Default

Altruista User : Provider_User
Regina John : Altruista Role
siddharth bulusu : Provider_User
test 123 : practice Admin
test test : altru's alt
test test : Provider_User

Selection

Jillene Rupp : Provider_User

> >> < <<

Start Date: 12/29/2016 End Date: 12/29/2017 **Assign**

- d. Click on the **Assign** button. Now the Care Coordinator Jillene Rupp is assigned to the Care Team for the selected members.

ASSIGN CARE MEMBER

Select Show Show Search Activity Export Excel

care team assigned successfully.

| <input type="checkbox"/> | Altruista Id | Last Name | First Name ▲ | Gender | Age | City | State | ZipCode | Phone | Medical Condition | PSU Score | Care Manager |
|--------------------------|--------------|-----------|--------------|--------|----------|-------------|-------|---------|--------------|---------------------|-----------|----------------|
| <input type="checkbox"/> | ALT8235 | LN1 | FN1 | Female | 43YEARS | N/A | AK | N/A | N/A | N/A | N/A | N/A |
| <input type="checkbox"/> | ALT8236 | LN2 | FN2 | Male | 26YEARS | N/A | AK | N/A | N/A | N/A | N/A | N/A |
| <input type="checkbox"/> | ALT8140 | Ph_001 | Ph_01 | Male | 11MONTHS | Springfield | AK | N/A | N/A | N/A | N/A | Wesley McRae |
| <input type="checkbox"/> | ALT8142 | ph002 | Ph2 | Male | 28YEARS | SPI | AK | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8108 | one | test | Male | 11MONTHS | delhi | NY | 12345 | N/A | Acute Otitis Media | N/A | test test |
| <input type="checkbox"/> | ALT8109 | two | test | Male | 11MONTHS | CA | NY | N/A | 396-986-5689 | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8110 | three | test | Male | 12MONTHS | N/A | NY | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8111 | eleven | test | Male | 17YEARS | mum | AL | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8113 | four | test | Male | 11MONTHS | N/A | NY | N/A | N/A | Diabetic retinop... | N/A | Altruista User |
| <input type="checkbox"/> | ALT8115 | five | test | Male | 11MONTHS | N/A | NY | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8116 | twelve | test | Male | 18YEARS | mum | AK | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8117 | six | test | Male | 12MONTHS | N/A | NY | N/A | N/A | N/A | N/A | Altruista User |
| <input type="checkbox"/> | ALT8119 | thirteen | test | Female | 7YEARS | mum | AL | N/A | N/A | N/A | N/A | Altruista User |

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1.6 Exercise: Assign a member to yourself (only applicable for Practice Administrator and Care Team Manager user roles)

1. In the Assign Care Member panel, enter in your organization's zip code as a search criterion and click Search.
2. For a member with no care staff assigned (indicated with a N/A status under the Care Manager column), select the check box on the left side of the member's name.
3. Search your name in the Care Staff search on the bottom left side; select your name and click "Assign".
 - a. Observe that you have you been successfully assigned to the member with the green confirmation message on the top of the panel.